

Investment Application Forms

Updated February 2, 2012

	Form #	Last Update
BMO Insurance		
Single Premium Immediate Annuity (SPIA) Application	348E	(11/2010)
Canada Life		
Generations•Generations I - Application for Retirement Savings and Non-Registered Accounts	148 CAN	(04/2011)
Generations•Generations I - Application for RIF, LIF and LRIF Accounts	147 CAN	(04/2011)
Generations•Generations I - Information Folder (now includes Summary Fact Statements)	143 CAN	(08/2011)
Generations•Generations I - Individual Variable Insurance Contract	144 CAN	(07/2011)
Estate Protection Application for Non-registered Funds	46-7168	(12/2010)
Estate Protection Information Folder	46-7163	(08/2011)
Estate Protection Contract	46-7164	(11/2010)
Canada Life Segregated Fund Application for TFSA	46-7305	(03/2011)
Canada Life Segregated Fund Application for RRSP, Non-Registered	46-7135	(03/2011)
Canada Life Segregated Fund Application for RRIF, LIF, LRIF	46-5714	(03/2011)
SPIA – Application for a Single Premium Annuity Policy – Registered and Non-Registered	188 CAN	(07/2006)
Empire Life		
Elite or Elite XL Investment Program Application	INP-0165	(06/2011)
TFSA Elite or Elite XL Application	INP-0278	(06/2011)
Empire Class Application	INP-0154	(06/2011)
TFSA Empire Class Application	INP-0279	(06/2011)
Empire Class Information Folder + Addendum	INP-0176	(05/2011)
Fund Facts	INP-0100	(05/2011)

Investment Application Forms

Updated February 2, 2012

Equitable Life

Pivotal Solutions & Pivotal Solutions DCS – Application	1377	(02/2011)
Guaranteed Interest Account - Application	799	(01/2011)
TFSA Pivotal Solutions & Pivotal Solutions DSC TFSA – Application	796	(01/2011)
Pivotal Solutions & Pivotal Solutions DCS – Contract	1379	(09/2010)
Pivotal Solutions & Pivotal Solutions DCS – RI/LIF Application	1378	(04/2011)
Pivotal Solutions & Pivotal Solutions DCS – RI/LIF Contract	1380	(09/2010)
Pivotal Solutions & Pivotal Solutions DCS – Information Folder	1381	(01/2011)
TFSA Guaranteed Interest Accounts TFSA Application	1382	(02/2011)
Immediate Annuity Application	355	(01/2010)

IAP

My Education – Individual Education Savings Plan Application	F23AP	(09/2010)
My Education – Family Education Savings Plan Application	F28AP	(02/2010)
Ecoflex – Investment Funds Application for an Education Savings Plan	F24AP	(10/2010)
Ecoflex / Ecoflextra - Application	F17AP	(10/2010)
TFSA Ecoflex /Ecoflextra Application	F17 -1AP	(10/2010)
IAG Savings and Retirement Plan – Information Folder	F13-772A	Jan 2011
Ecoflex - Summary fact Statement and Financial Highlights	F13-526AP	(01/2010)
Ecoflextra - Information Folder and Individual Contract	F13-681AP	(10/2009)
Ecoflextra - Summary fact Statement and Financial Highlights	F13-680AP	(01/2010)
Diploma Individual Education Savings Plan Application	F25AP	(03/2010)
Diploma Fund Application	F26AP	(09/2010)
Diploma Information folder	F13-443A	(01/2011)
TFSA High-Interest Tax Free Savings Account Application (PDF Only)	F17-2AP	(03/2010)

Investment Application Forms

Updated February 2, 2012

Manulife Financial

Manulife GIF Select Application for Non-Reg, RSP, LIRA, LRSP	NN0821E	(09/2011)
Manulife GIF Select Application for RIF, LIF, LRIF, PRIF	NN0891E	(09/2011)
TFSA Application for GIF Select InvestmentPlus	NN1565E	(10/2010)
GIF Select (Base) InvestmentPlus Informaton Folder and Contract	MK2278E	(01/2012)
GIF Select EstatePlus Information Folder and Contract supplement	MK2279E	(01/2012)
GIF Select IncomePlus Version 2 Information Folder and Contract supplement	MK2280E	(01/2012)
GIF Select Fund Highlights	MK2343E	(04/2010)
GIC Application Guaranteed Interest Contract	NN0978E	(12/2009)
TFSA GIC Application Guaranteed Interest Contract	NN1566E	(12/2009)
Application for Annuity	NN0486E	(10/2011)

RBC Insurance

RBC GIF Application for Registered and Non-Registered Contracts	83146	(11/2010)
RBC GIF Information Folder and Contract (Including Fund Facts)	83194	(11/2010)
TFSA RBC GIF Application for Tax-free Savings Account	83124	(11/2010)

Investment Application Forms

Updated February 2, 2012

Standard Life

Ideal - Application for an Ideal Segregated Fund Policy	4295	(06/2011)
Ideal Segregated Fund Information Folder	4292	(06/2011)
TFSA Ideal Segregated Fund Application	6461	(06/2011)
Ideal - Segregated Funds Signature Series Application	6415	(01/2012)
TFSA Ideal Segregated Funds Signature Series Application	6463	(01/2012)
Ideal Segregated Funds Signature Series Information Folder	6414	(01/2012)
Ideal - Application for an Ideal Term Fund Policy	5381	(01/2012)
TFSA Ideal Term Fund Application	6462	(11/2011)
Application for your Annuity – Registered as an RSP or a Non-Registered Annuity	3058	(11/2008)

Transamerica Life

Transamerica GIF Application	IP1299	(08/2011)
TFSA Transamerica GIF Application	IP1302	(08/2011)
Transfer from a Registered Qualified Policy to an imaxxGIF Contract Application	IP1212	(09/2009)
Five for Life Application form	IP1172	(08/2011)
Simplified Maturity Application Form	IP1309	(11/2010)
Guaranteed Interest Account Application Form	IP 1303	(04/2010)
SPIA – Application for a Single Premium Immediate Annuity Policy	IP-NB151	(06/2011)